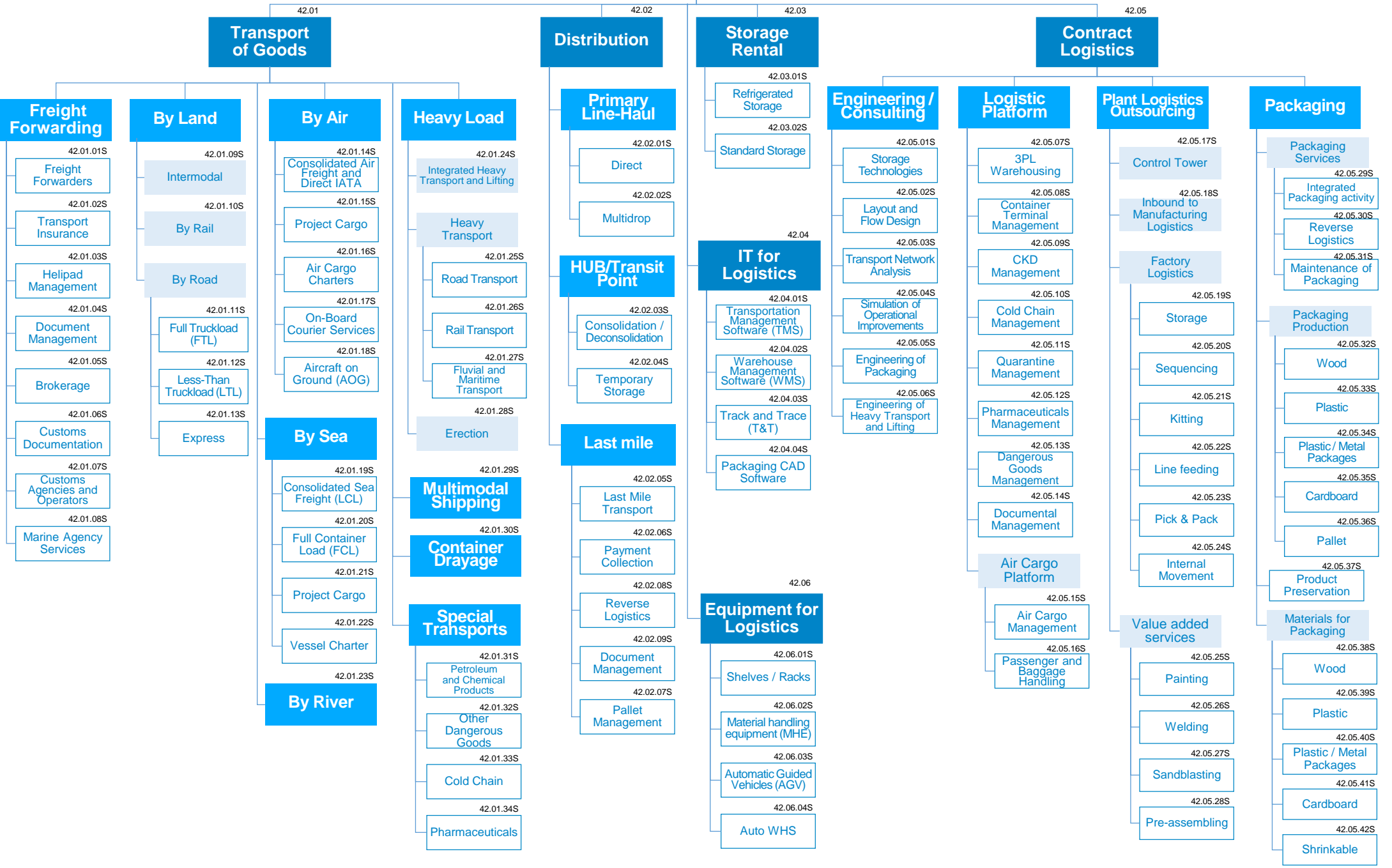


Logistics



Logistics

Logistics is the management of the flow of physical items (food, materials, equipment, liquids, ...) between the point of origin and the point of consumption in order to meet requirements of end-users. Any business sector (e.g. Automotive, Energy, Industrial, Aerospace & Defence, Consumer, Healthcare, e-commerce, ...) typically requires customized solutions for its logistic need. It involves the integration of information flow, material handling, production, packaging, inventory, transport and warehousing.

Logistics management is the part of supply chain management that plans, implements, and controls the efficient, effective forward, and reverse flow and storage of goods, services, and related information between the point of origin and the point of consumption in order to meet customer's requirements.

The logistics of people and Offshore Naval Logistics have not been considered in this Group of Categories.

MAIN RATIONALES BEHIND THE STANDARD CATEGORIZATION

Transport of Goods

- Transport of Goods is characterized sub-divided based on the type of good transported and the modal of transport, which defines the competition:
 - "Normal" goods (in gauge), further characterized by modal, which differentiates the competition and at the same time may be relevant for Buyers, depending on the destination they want to reach
 - Transport by Sea, in particular is differentiated for the type of cargo transported (Containers vs. Project Cargo for large items)
 - Sea cargo can be classified in multiple ways depending on the number of senders and receivers, however, the competition typically differentiates just FCL and LCL among their services
 - FCL/FCL: One sender → One receiver; FCL/LCL: One sender → Multiple receivers; LCL/FCL: Multiple senders → One receiver; LCL/LCL: Multiple senders → Multiple receivers) Heavy Load, which usually involves large industrial components (e.g. pressure vessels, ...)
 - Special Transport, which involves dangerous and hazardous materials
 - Freight Forwarding is composed by support / agency services
- Transport of hazardous goods does not include waste disposal services, which are included in another group of categories (General and Various Services)
- Commercial triangulations could have been included as a sub-category, but for the purpose of this Standard Categorization they have been considered linked to a fiscal choice of the client rather than a competence of the logistics operator.
- Consolidated Air Freight and Direct IATA are usually different services offered by the same provider, they were therefore included in the same category.
- Aircraft On Ground (AOG) shipments have been detailed in a dedicated category as they require specific competences (ability to transport oversized components in a timely manner).
- Logistics categories that are considered "consumer" (or at least outside the B2B world) were generally not detailed in a specific category (e.g. the transport of pets or of art pieces).

- Pharmaceuticals logistics is usually handled as an integrated solution by the provider, which needs to endure speed, temperature control and regulatory compliance. It has therefore been listed as a separate category under special transport

Distribution

- The main difference between Transport and Distribution is that the latter has also a relevant service component. Distributors usually deliver either Primary Distribution (from a production facility to a distribution center) or Last Mile Distribution (from the distribution center to the final consumer or retail shop)
- Within Distribution, "Consolidation and Deconsolidation" services are often offered by the same player and have therefore been included in the same category.

Storage Rental

- Differentiated from Warehousing because these suppliers simply offer the rental of a space, which can be refrigerated or not, but do not manage it. They operate therefore more like a real estate company

IT for Logistics

- Companies that provide IT services related to logistics are usually specialized and don't offer other logistics services; IT was therefore listed as a separate family

Contract Logistics

- Plant Logistics Outsourcing:
 - While "Transport of Goods" and "Distribution" include all the movements of products from the plant to the end-users, inbound and factory logistics have been classified under the "Plant Logistics Outsourcing" Family
 - Main types of Logistics services related to manufacturing, which include extremely differentiated services (provided by different actors), are:
 - Network Logistics: Inbound, Transit Point and Outbound logistics for a manufacturing facility
 - Plant / Factory Logistics: logistics services delivered inside the factory such as Sequencing and Line Feeding
 - Logistics Platform: activities related to the production platform, such as warehousing
 - Value Added Services: part of the production activities delivered directly by the logistics provider
- Packaging:
 - The "Packaging Service" Family identifies a specific service - the packaging of goods to be transported. It includes four different types of players:
 - Producers of packages, differentiated by the material they can deliver
 - Providers of materials for packages, sub-suppliers to the Producers
 - Providers of services such as Maintenance of Packaging
 - Integrated packagers
 - Reverse logistics is for all operations related to the reuse of products and materials. It is the process of moving goods from their typical final destination for the purpose of capturing value, or proper disposal. It could have been considered within the Family of "Distribution" services.